

PMB Policies and Procedures

Document Formatting Standards



Montana Department of Public Health and Human Services

Technology Services Division

July 31, 2008



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Acknowledgements

This document was adapted from the Department of Environmental Quality's Water Quality Planning Bureau Document Requirements dated 08/27/2007.



1.0 REQUIRED FORMATTING

All documents **MUST** be in MS Office Suite compatible format. The Bureau will not allow WordPerfect and other composition software. All scanned photos and maps must be in either .jpg or .PDF format. All GIS maps and engineering design drawings must be in one of the following formats for its native form and in .jpg or .PDF for web publishing purposes:

1.1 Margins

- Top = 1
- Bottom = 1
- Left = 1
- Right = 1
- Gutter = 0
- Header = 0.5
- Footer = 0.5

1.2 Headers

Font formatting for the header will be Arial, font size 10, blue text color, and bold. A table (i.e., 2 rows by 2 columns) will contain the header text. The table will have a middle borderline formatted in blue with a 1 pt thickness. The left column, rows will be merged and contain the Montana State seal. The top row of column two will contain the text “Montana Department of Public Health and Human Services.” This text will have the following format: Arial, font size 10, blue text color, all caps, and bold. The bottom row of column two will contain the document title. This text will have the following format: Arial, font size 10, blue text color, and bold. Headers will be different for each section and will have the same first page, i.e., do not select the different first page option in page setup.

1.3 Footers

Font formatting for the footer will be Arial, font size 10, blue text color, and bold. A table (i.e., 1 row by 3 columns) will contain the footer text. The table will have a top borderline formatted in blue with a 1 pt thickness. The document date (e.g., June 9, 2008) will appear in the left column. Page numbering will appear in the middle column of the table. The format of page numbering will be “Page X of Y.” The right column will contain the text “Technology Services Division.” Footers will be the same for each section. Page numbers for a new section will start with the next number sequentially from the previous section. Introductory pages can be i, ii, iii, etc. and will have the same first page, i.e., do not select the different first page option in page setup.



1.4 Tables

Table captions should be included in the first line of the table. For that first row, only the bottom of the cell should have the border (**Table 1-1**). The rest of the table should have ½ pt line grid (**Table 1-1**). The second line of the table should have the column headings and be shaded at 10% (**Table 1-1**).

Table 1-1. Table Title Caption

Column 1 Title	Column 2 Title	Column 3 Title	Column 4 Title

2.0 STANDARDIZED FONT DESCRIPTION

Use the same font throughout the whole document to be consistent (Times New Roman).

2.1 Main Title Page

The main title will be associated with the System or Project Title. Its formatting will be Arial, bold, and centered. Size may vary depending on length of title. Below the main title will be the document title. The Subtitle format will be the basis if the document title, except that the text will be italicized and the format will be “Document Title” in the formatting list. After the document title, will appear a GIF of Montana’s state seal. After the State seal, the remaining text will use the Subtitle format and will include the following text:

- Line 1 will be “Montana Department of Public Health and Human Services”
- Line 2 will be “Technology Services Division”
- Line 3 will be the last saved date of the document (e.g., July 29, 2008 8:02:00 AM)

2.2 Headings

Format headings as follows to create table of contents:

- **1.0 (section headings) = Heading 1:** Arial, font size 16, bold, small caps, align left, no indenting. Type Section number and insert a soft return for description (i.e. Introduction).
- **1.1 = Heading 2:** Arial, font size 14, bold, aligns left with no indenting.
- **1.1.1 = Heading 3:** Arial, font size 14, bold, aligns left, no indenting.
- **1.1.1.1 + = Heading 4:** Arial, font size 14, bold, aligns left, and no indenting.



- **Unnumbered important headings = Heading 5:** Arial, font size 12, bold, aligns left, no indenting.
- **Table captions = Heading 6:** Arial, font size 12, bold, aligns left, no indenting. Insert caption into the first cell in the table to allow repeat at top of each page if overlapping occurs.
- **Figure captions = Heading 7:** Arial, font size 12, bold, aligns left, and no indenting. Figure captions should appear below the figure.
- **Appendices = Heading 1:** Arial, font size 16, bold, small caps, align left, no indenting. Type Section number and insert a soft return for description
- **Text = Normal:** Times New Roman, font size 12, align left, no indenting, and the widow orphan control should be on. Single-space after periods when typing text.

2.3 Paragraph

Use single spacing with no additional spacing before or after any lines. Insert a blank line in-between all paragraphs, headings, tables, and figures, etc. Insert a next page section break to start a new section.

2.4 Table of Contents

The Table of Contents will use the formal format defined in MS Word and Headings 1 – 3.

2.5 List of Tables

The List of Tables will use the formal format defined in MS Word and Heading 6.

2.6 List of Figures

The List of Figures will use the formal format defined in MS Word and Heading 7.

3.0 PREFERRED WORD USE

3.1 Numbers

When a number begins a sentence, spell it out or rearrange the sentence so there is a word before the number. Spell out numbers from 1 through 10; use figures for numbers above 10. Use all figures, even for numbers 1 through 10, when they have technical significance or for dates, money, clock time, proportions and ratios, and percentages. Use the same style to express related numbers above and below 10. If any numbers are above 10, put them all in figures.

3.2 Affect vs. Effect

Affect is most commonly used as a verb, and effect is most commonly used as a noun.



3.3 Its vs. It's

Possessive pronouns do not take apostrophes. This includes ITS, as well as my, your, her, his, our, their. "It's" with an apostrophe, means, "it is" and is a contraction. As a rule of thumb, it is best to never use contractions in formal writing.

3.4 s vs. 's

When forming plurals of acronyms, form the plural with a lowercase "s" (never an es) PBXs (not PBXes or PBX's), CPUs, LANs.

When forming certain plurals, add apostrophe s. Apostrophes are used to form the plural of symbols (#'s, ~'s, @'s), single letters (U's can sometimes be confused with v's), and abbreviations with internal punctuation (Ph.D.'s and M.C.S.'s). However, In general, do not use periods in an abbreviation or acronym unless it can be confused with a word (such as in for inches or am for a.m.).

3.5 Data

Data is ALWAYS plural. Datum is the singular version of data.

4.0 PUNCTUATION

4.1 Quotation Marks

When using quotation marks, commas and periods always go inside the ending quotation marks while semicolons and colons always go outside.

The habitat alteration cause is "alteration in vegetative covers," and the siltation cause is referred to as "sedimentation."

There were three rivers that were considered "impaired": The Powder River, the Tongue River, and the Yellowstone River.

4.2 Serial comma

A comma should go before the conjunction in a series of three or more items. Although grammar gurus abandoned this comma rule for a while in the twentieth century, it has since been realized that using the serial comma (as it is called) is sometimes necessary for clarity. For the sake of document consistency, it should always be used.

The assessments included field measurements, photo documentation, a riparian survey, sampling for aquatic insects and algae, and water column measurements.



or

The counties included are Cascade, Teton, and Lewis and Clark.

Without the comma, the sentence would be awkward and unclear.

The assessments included field measurements, photo documentation, a riparian survey, sampling for aquatic insects and algae and water column measurements.

or

The counties included are Cascade, Teton and Lewis and Clark.

4.3 Bulleted and Numbered Lists

In a bulleted list, the bullet takes the place of punctuation (such as commas or semicolons) between items in a list. Do not use any punctuation at the ends of bulleted items that are not sentences. There is also no need for a concluding period at the end of a bulleted list, even when that list is a continuous sentence—that lone period will look lost down there. When your bulleted items are sentences, capitalize the first letter of each and use appropriate end punctuation. When they consist of single words or phrases, lowercase is best.

Use bullets when order is not a factor. Use numbered lists for sequential items.

5.0 CAPITALIZATION

“Capitalize federal or state when used as part of an official agency name or in government documents where these terms represent an official name. If they are being used as general terms, you may use lowercase letters.

The state has evidence to the contrary.

That is a federal offense.

The State Board of Equalization collects sales taxes.

We will visit three states during our summer vacation.

The Federal Bureau of Investigation has been subject to much scrutiny and criticism lately.

Her business must comply with all county, state, and federal laws.



You may capitalize words such as department, bureau, and office if you have prepared your text in the following way:

The Bureau of Land Management (Bureau) has some jurisdiction over Indian lands. The Bureau is finding its administrative role to be challenging.”¹

6.0 PICTURES

Compress pictures after removing color. To do this, double-click the picture. On the “picture” tab, select “Compress” in the lower left corner. Select either the specific or all the pictures and make sure both check boxes are selected to compress the picture and delete the cropped area.

7.0 REFERENCES

References will be formatted using the Chicago Style.²

8.0 NON- COMPLIANT FORMATTING

The following formatting can cause problems with editing, printing, converting, web publishing, and/or Internet accessibility:

- Do not use automatic numbering on section headings (1.0, 1.1, etc.), table captions, and figure captions. Type in the number in all cases except for numbered lists.
- Do not use the “keep with next” and “break before” options (paragraph format).
- Absolutely no corporate logos will be included in any document. This includes no corporate logo for cover pages, maps, figures, designs, etc.
- Cover Pages may contain Agency Logos, but corporate partnership and/or authoring will only be done in text format that is in compliance with the PMB standardized font description.
- No corporate names are to be included in any header or footer.
- No corporate reference will be allowed unless specifically for introduction, literature citation, or quotation within the document.
- Identification of figure and design authors is allowed by printing of the corporate employee’s name followed by a comma and then the corporate name. No logo will be associated with the identification.
- No watermarks will be allowed in any document.
- Do not use fonts other than Times New Roman or Arial.
- Do not use unusual, picture, or custom bullets.

¹ The Blue Book of Grammar and Punctuation, “Capitalization,”
<http://www.grammarbook.com/punctuation/capital.asp> (Accessed June 9, 2008).

² The Chicago Manual of Style Online, “Chicago-Style Citation Quick Guide,”
http://www.chicagomanualofstyle.org/tools_citationguide.html (Accessed June 9, 2008).



- Do not indent headings and text. Indenting will only be used to set important key points apart (e.g., bullets, quotes, responses to comments, etc.).
- Do not write protect/password protect or otherwise lock any documents provided to the PMB.

9.0 REQUIREMENTS FOR LARGE DOCUMENTS (OVER 50 PAGES)

For large complex documents, Adobe PDF format provides the greatest control of document and printer formatting. Adobe PDF documents should have bookmarks created for main chapters, tables, and figures. Save documents containing bookmarks with bookmark view open.

10.0 WEB DOCUMENTS

The web-formatted document should include a working table of contents to the main chapters, tables, and figures. Images should be optimized for the web, typically at 800x600px screen resolution (72 dpi) and efficiently sized to allow reasonable downloading from modems. Extremely large images that cannot be scanned at a reasonable size should be referenced in the document and stored at the PMB office for viewing (e.g., large tables).

Adobe PDF documents should have bookmarks created for main chapters, tables, and figures. Save documents containing bookmarks with bookmark view open.

Documents should include appropriate title and author. Optimize documents for Fast Web View. Document should be designed observing Accessibility requirements and checked with the Accessibility Checker.

Federal 508 requirements <http://www.section508.gov/index.cfm?FuseAction=Content&ID=12>.

Adobe Acrobat 5.0 Accessibility Information
http://www.adobe.com/products/acrobat/pdfs/Sect_5085.pdf.

W3C Web Accessibility Initiative <http://www.w3.org/WAI/>.

11.0 CHANGE RECORD

Table 11-1. Revision History

Date	Version	Name	Comments
06/09/2008	0.1	Staci Stolp	First Draft
06/09/2008	0.2	Staci Stolp	Added change record and document approval



MONTANA DEPARTMENT OF PUBLIC HEALTH AND HUMAN SERVICES
Project Management Bureau – Document Formatting Standards

06/09/2008	0.3	Staci Stolp	Changed “Project title” to PMB Policies and Procedures
07/29/2008	0.04	Staci Stolp	Changed footer, added language on appendices
07/31/2008	0.05	Staci Stolp	Added Appendix # to header

12.0 DOCUMENT APPROVAL

Chief, Project Management Bureau

Date